



PATENT  
Customer No. 39,878  
Attorney Docket No. 0005.0005

**IN THE UNITED STATES PATENT AND TRADEMARK OFFICE**

In re Application of : Patrick J. COYNE Confirmation No.: 9305  
Application Number : 10/661,612  
Filed : September 15, 2003  
Title : PROJECT MANAGEMENT SYSTEM, METHOD, AND  
NETWORK, EMPLOYING ODBC-COMPLIANT DATABASE  
AND SQL AND COLD FUSION SERVERS  
TC/Art Unit : 2168  
Examiner: : PARDO, Thuy N.  
Docket No. : 0005.0005  
Customer No. : 39878

**DECLARATION UNDER 37 C.F.R. §1.131**

I, Patrick J. Coyne, state that I am the named applicant of the above-identified application and the inventor of the subject matter described and claimed therein.

1. I am the sole inventor of the invention of claims 1-3, 7-25, and 29-55 of the above-identified application, as reflected in the Amendment and Response filed with this Declaration.

2. In my prior Declaration dated June 24, 2008 that I submitted in this matter, I stated that I conceived of at least the invention of claims 1-3, 7-25, and 29-55 of the above-identified application, in the United States, at least as early as November 3, 1999. Since submitting my June 24, 2008 Declaration, I have identified additional records that I am enclosing with this Declaration that corroborate that the present invention was conceived at least as early as July 28, 1998.

3. Prior to April 1998, I conceived of and was working on developing an application of the invention described in this application. I initially worked in Lotus Agenda, prior to April 1998. The Lotus Agenda software, however, had certain limitations regarding data that was maintained in inconsistent formats. I am not a programmer or a specialist in computer software. I provided the concept and direction to others who assisted me in writing an application, at my direction, embodying my concept for the invention.

4. My original concept, which I possessed prior to April 1998, involved merging data from various software applications that I used in my law practice, many of which maintained data in incompatible formats, into a single professional services practice application from which I could view the data from various, otherwise incompatible, sources.

5. I envisioned doing this through the use of one or more servers that would interface with the various software applications in order to deliver the data to the user (the attorney or other professional who is managing a matter) in a common format through a professional services practice management application, from which it could be viewed and used conveniently, without having to access multiple, potentially incompatible sources.

6. I changed law firms in January 2003, and, consequently, since that time, no longer have access to all of my records of the development work that I conducted on this invention prior to January 2003. Nonetheless, I do have certain records from this period and I am providing copies of pertinent portions of these records as exhibits to this Declaration. In accordance with 37 C.F.R. §1.131 and M.P.E.P. §715.07, I have

enclosed with this Declaration materials evidencing the conception and diligence in the reduction to practice of the present invention. Each of the copies of materials appended to this Declaration is a true and correct copy of records that I generated, or required to be generated by persons with knowledge of the facts recorded therein, at or about the time referenced with respect to the particular record. I have maintained these records in my possession, documenting some of my work on this invention.

7. Attached hereto as Exhibit A are two undated, handwritten graphs that, to the best of my recollection I made in early 1998, or earlier, of a concept of the invention, depicting tracking a patent or trademark matter. The documents attached hereto as Exhibit A are true and correct copies. The first page depicts schematically consolidating information from various sources that represents a variety of data formats (documents ("Docs"), word processing ("WP"), accounting ("Acct."), docketing ("Dock"), reports, spreadsheets ("Spreads"), and address lists ("Addr.")) and making it available through a single software application or interface (the central, vertically-elongated rectangle).

8. The second page of Exhibit A depicts one form of a proposed user interface of the invention for tracking patent or trademark matters, compiling: bibliographic information (upper left-hand corner) about a matter (from either a "Lotus Notes" database or "CPI" docketing system); time spent ("t") on the matter to-date, relative to the anticipated time that was budgeted for the matter, from the firm's time and billing records (such as a "Lotus Notes" database or other source) (shown on Exhibit A immediately below the bibliographic information area); billing-to-date information ("\$\$") relative to the total budgeted amount for the matter (shown on Exhibit A below the time line) from the firm's financial accounting system (typically maintained in "TMC," "Elite,"

or another, comparable, financial management software system that was in common use by law firms at that time); scanned images or icons representing pertinent documents relevant to the project (below the time and budget lines); the text of the claims or recitation of services (from a word processing document or image file of the as-filed documents); abstract; and various other, pertinent data.

9. A key feature of the concept depicted in Exhibit A is that these various data sources maintain their data in various, relatively incompatible formats, effectively precluding the data from being displayed in a common or single application or user interface.

10. Beginning in about March 1998, I moved the concept from a Lotus Agenda software application platform, in which I was working at that time and in which I personally was unable to merge the data from these various relatively incompatible sources, to a Lotus Notes platform. As I was not sufficiently skilled in programming in Lotus Notes at that time to accomplish this task myself, I retained a commercial vendor, QSMI, to assist me in the process of applying my concept in a Lotus Notes database application.

11. During the period from March 1998 through 2002, QSMI performed development work on my invention to assist me in writing an application that embodies my invention. I explained my invention to QSMI and asked QSMI to write a Lotus Notes application embodying my concept. I was in contact with software programmers at QSMI continually during the period from about March 1998 through well after December 10, 2001, through 2002, while they worked on this project.

12. During this period, I had numerous meetings and communications with QSMI about this development work. Although I do not currently have possession of the records of all of these meetings and communications, attached to this Declaration are copies of some of the communications I had with QSMI.

13. During the Spring and Summer of 1998, QSMI wrote a software application in Lotus Notes, embodying at least some of the concepts of my invention. On November 3, 1998, programmers from QSMI met with me at my office in Washington to discuss the draft that they had prepared and to secure feedback regarding the development of a Lotus Notes embodiment of my invention. Attached hereto as Exhibit B is a copy of a set of notes that I prepared for the November 3, 1998 meeting with QSMI. Exhibit B details various of the edits I was requesting to the user interface for the professional services practice management application software at that time. Exhibit B discloses various of the data formatting and interface requests I made and, in so doing, reflects some features of the structure of the database, as it existed at that time, as well as of my concept of the invention.

14. The software that is the subject of Exhibit B incorporated various elements of the concept that is disclosed and claimed in the pending application. Specifically, attached hereto as Exhibit C is a true and correct copy of a printout of certain "Form View" pages from the Lotus Notes database, as it existed at the time of our November 3, 1998 meeting. Exhibit C bears my date stamp showing the November 3, 1998 date. Exhibit C is a copy of some of the papers that I used during the November 3, 1998 meeting to discuss with QSMI various edits that I was requesting to the application. Exhibit C includes field names for the data in a professional service practice

management application of the invention that correspond to field names that were implemented, through servers, in other of the firm's databases (such as word processing, docketing, etc.) to draw data from certain of these other applications into the Lotus Notes application.

15. Exhibit C evidences not only that the concept was completed by this time but also that work on the project was continuing through the Summer of 1998. The Lotus Notes Form View had a function at that time that indicates when the last edit is made to the particular form. For example, the "Client Form" starting on the first page of Exhibit C, was edited by Carrington V. Thompson ("cvt"), of QSMI, on September 28, 1998, as reflected by the edit information depicted in the notation: "last modified by cvt 9/28/98," in the lower left hand corner of the first page of Exhibit C. The "Event Form," which begins at the fourth page of Exhibit C, bears editing information in the lower left-hand corner of the page establishing that this form was "last modified by cvt 7/28/1998" and on the seventh page of Exhibit C establishing that this form was "last modified by cvt 8/3/1998." Other forms in Exhibit C include similar information, reflecting ongoing activity on the project during the Summer and Fall of 1998. These records evidence that I had conceived and was working on reducing to practice the invention, at least as early as July 28, 1998.

16. Work continued on this project from the first quarter of 1998, when I retained QSMI and continued for several years, through the filing of the priority document in 2001, and continuing after the priority document was filed through 2002. Exhibits B and C reflect the concept of various of the features of the claimed invention. The field names indicated in the rectangular boxes on the right side of the forms shown

in Exhibit C represent field names in Lotus Notes of various data fields that were drawn from various other databases within the firm. Information such as "Client\_Name" and "Client\_No" shown on page 1 of Exhibit C were drawn from the firm's master client list maintained in various databases in applications such as WordPerfect, Lotus, and/or Excel. Prosecution events, such as "Patent\_Routing" and "TM\_Routing" shown on page 2 of Exhibit C, or other information, such as "Invention Detail, as shown on page 6 of Exhibit C, were intended to be drawn from the firm's docketing system. At that time, the firm used a version of the CPI software application for docketing, which was a proprietary or relatively "closed" system, that was not in a compatible data format with data from other sources of data such as the Client list or Client number or other bibliographic information.

17. I was diligent in reducing to practice the invention of claims 1-3, 7-25, and 29-55 of the above-identified application, as reflected in the Amendment and Response filed with this Declaration, from at least as early as March or April 1998, and in no event later than July 28, 1998, to the filing date of the application. The filing date of the earliest co-pending application upon which priority is claimed for the present application, U.S. Provisional Application No. 60/337,158, is December 10, 2001.

18. Attached hereto as Exhibit D is a copy of the Appendix that was submitted with co-pending application, Serial Number 10/315,196, filed December 10, 2002. Exhibit D also reflects continual, ongoing work on the claimed invention.

19. Exhibit D, as is Exhibit C, is a printout of various forms of the Lotus Notes database. Exhibit D was made after Exhibit C. As does Exhibit C, Exhibit D contains details evidencing when certain edits were made to the forms. The Examiner's attention

is directed to, for instance, pages A-17 and A-56 of Exhibit D, which depict a professional services project management application that can query different data sources with differing key values and provides a mapping between various fields. The software returns values to the application from the data sources in accordance with embodiments of the present invention. These functions are associated with claimed features, including a "first server" cooperating with a "second server" to transfer data to the application. It further evidences compiling data into the professional services practice management applications from different applications, including an ODBC-compliant application ("ODBC Column"). In this instance, the Notes Field reflects the professional services project management database in a common data format and the ODBC Column reflects data in an "open" or "portable" data format. Page A-17 of Exhibit D reflects that "Notes Field" maps to a "Field Type," an "ODBC Column" in the applicable ODBC-compliant database, and a "Column Type".

20. Attached hereto as Exhibit E is a copy of my prior Declaration in this application, along with a "Synopsis" of a version of a Lotus Notes database, embodying the present invention. The Synopsis appended as part of Exhibit E was printed on November 3, 1999. It reflects ongoing work on one version of the software application from March 3, 1999, through November 3, 1999. The version of the software reflected in Exhibit E—Version 2.5.5—memorializes the continuing evolution of the software through various edits made since QSMI began working on the project in the first half of 1998. This version 2.5.5 was created on March 18, 1999, as evidenced by the entry on the sixth line of the second page of the Exhibit, which reads: "Date Created: 03/18/1999 11:50:32 AM." Exhibit E further reflects that the last modification to



this particular version 2.5.5 of the software was made on "11/3/1999 4:38:52 PM," on the following line.

21. Exhibit E contains a detailed description of the software as it existed at that time, reflecting the mapping of the various fields of data from other software applications where the data was stored, as well as the details of various pull down lists, scripts, and other details of the operation of the software at that time. The version of the software expressed in Exhibit E was designed to take data having different data formats from two or more applications, including applications in which the data is maintained in relatively incompatible formats, such as, at that time, a CPI docketing system, TMC time and billing system, and other databases that maintained data in Notes, Word, Lotus, Excel, and/or other applications, and combine them in a common or single data format and display the data to the user, avoiding the need for the user to access multiple, relatively incompatible software applications in order to access the data of interest to managing a professional services project, such as a patent or trademark application.

22. Exhibits F, G, H, I, and J, are a series of notes and emails reflecting changes made to the Lotus Notes software application from November 3, 1999, through February 24, 2000. I held a meeting with QSMI on November 3, 1999, to discuss the continuing work on the application. Exhibit F is a set of my typewritten notes, which I printed out on January 14, 2000. Exhibit F bears my handwritten notation at the upper right hand corner that it was for the November 3, 1999 meeting, at which I outlined a series of changes that I was requesting that QSMI make to the Lotus Notes software application embodying aspects of the invention.

23. Exhibit G is copy of an email, dated November 8, 1999, containing a response from Mike Hoagland, of QSMI, to certain of the requests that I made during the November 3, 1999, meeting.

24. Exhibits H, I, and J are a series of emails from one of the Secretaries in my Intellectual Property Practice Group, detailing the status of certain of the changes that I requested at the November 3, 1999 meeting. Exhibit H is an email dated November 22, 1999, detailing the status of certain of the changes. (A reference to certain confidential and proprietary information has been redacted at the point indicated.)

25. Exhibit I is an email dated December 10, 1999, detailing the continuing progress on the changes requested at the November 3, 1999 meeting with QSMI. (References to certain confidential and/or proprietary information have been redacted at the points indicated.) Similarly, Exhibit J is an email, dated February 14, 2000, detailing additional progress on certain of the changes requested on November 3, 1999. (A reference and the attachment to Exhibit J, containing certain confidential and/or proprietary information, have been redacted.)

26. On November 22, 1999, I made additional notes, detailing the integration into the then-current version of a professional services practice application of the invention of certain accounting information that was part of the concept. Exhibit K is a series of handwritten charts that were prepared by me on November 22, 1999, depicting various ways in which accounting data from the firm's proprietary financial accounting system might be integrated into, and displayed as part of the professional services practice management application of the present invention. This data was maintained at

that time in a software application provided by TMC and was a "closed" or "proprietary" system in which the data at that time was not maintained in a "portable" format.

27. Work continued on the software application throughout 2000. Exhibit L is a copy of my handwritten notes made and updated at various times between April 18, 2000 and August 22, 2000, memorializing some of the meetings about, and changes to, a software application embodying aspects of the present invention that I had during this period. Exhibit L reflects on page 4, in the entry for "8-22-00" that, by August 22, 2000, we were successfully driving information from the docketing system to the Lotus Notes application software. This docketing information, along with the accounting information from the financial services software had been among the more difficult problems to solve, due to the proprietary and, consequently, relatively "closed" format of various prior versions of the docketing software.

28. Exhibit M is a table, dated September 7, 2000, prepared by one of my staff at my direction, detailing various suggestions and bug fixes that I requested from QSMI. Throughout 2000 and 2001, I continued to meet and communicate with QSMI, to discuss improvements and changes to the Lotus Notes software application embodying the present invention. Among the changes identified in Exhibit M, in the fifth row of the table, is creation of hypertext links interfacing with databases to transfer information to the professional services practice management application. In the ninth row of Exhibit M, I requested changes to "Pull Foreign Associate names from Marketing database . . . ." data that was maintained at that time in a relatively "open" or "portable" data format.

29. Exhibit N is a copy of my handwritten notes for a meeting with QSMI on September 22, 2000, at my offices, during which we discussed the status of the

software and progress to date. Among the notations in Exhibit N is a note on the first page beside the bullet heading "(CPI)"—the docketing software we were using at the time—that the information could be moved from CPI 2000 (which at that point employed a Microsoft Access database) to Lotus Notes through the use of a SQL server.

30. One of the issues I discussed with QSMI during the September 22, 2000, meeting was training on the software application. Attached hereto as Exhibit O is a copy of a preliminary draft of training materials QSMI prepared at my request for the Lotus Notes practice management software application embodying aspects of the invention. Exhibit O reflects the claimed functionality of the invention to combine data useful for management of a professional services practice and make it available to the user in a repository, avoiding the need to access multiple, potentially incompatible software applications having incompatible data formats.

31. On February 20, 2001, I met again with QSMI to discuss the continuing work on the software. Exhibit P is a copy of a letter from QSMI to me, dated April 6, 2001, memorializing the status of the issues we had discussed at our February 20, 2001, meeting. (The indication "IP Agenda" database refers to the name that QSMI gave the software project which was written in Lotus Notes software and is not a reference to a Lotus Agenda software application platform.) Exhibit P memorializes, among other things, the task, in item No. 6, to "create scheduled or manual data exchanges to load data from CPI and TMC Finance databases into the IP Agenda Database on a periodic basis." Exhibit P reflects the concept of the invention by compiling data from multiple applications, including proprietary applications, some of

which may be in incompatible data formats, and making the data available in a practice management application.

32. I met again with QSMI on April 6, 2001. Exhibit Q is a copy of my handwritten notes of my April 6, 2001, meeting with QSMI, detailing further work on and improvements to the software.

33. Exhibit R is a copy of my typewritten notes of our April 6, 2001, meeting, reflecting continuing activity to refine the software application as well as a schedule of additional meetings to continue our development work.

34. I met again with QSMI on April 23, 2001. Exhibit S is a copy of my typewritten notes from our April 23, 2001, meeting, detailing additional work being done on the software. The entries at Paragraphs I.A.1. and I.A.2. reflect drawing data from the TMC and address book databases, which were at that time in different and relatively incompatible formats. The entry at Paragraph I.B.4. reflects my instruction to draw data from TMC, which was at that time in a relatively "closed" or "proprietary" format. The entry at Paragraph III.A.4. of Exhibit S reflects the functionality of pulling data from different applications, such as CPI, and making it available in a professional service practice management application of the invention. The entry at Paragraph III.B.1.b. reflects my instructions to QSMI to draw data from another database that was maintained in a different format, the i Enterprise Database, which was being used to maintain address and contact information. Various other entries in Exhibit S reflect different databases and different data formats.

35. Exhibit T is a letter from Carrington Thompson, of QSMI, to me, dated May 4, 2001, memorializing our April 23, 2001, meeting, and providing additional information

regarding the further improvements that I requested in the software. Among the tasks outlined in QSMI's proposal is to: "Create scheduled or manual data exchanges to load data from CPI and TMC Finance databases into the IP Agenda Database on a periodic basis." CPI was the docketing system and TMC was the financial accounting software application that I was using in my law practice at that time. These CPI and TMC applications are two of the applications that I was integrating into a professional services project management application of the invention. TMC, in particular, was at that point a proprietary application that maintained data in a relatively "closed" or "proprietary" format.

36. Exhibit U is a memo from me to QSMI and others in my firm, dated May 29, 2001, detailing the additional changes that I discussed and agreed upon with QSMI at an April 23, 2001, meeting with QSMI. (Certain pages of Exhibit U, containing proprietary and/or confidential information, have been redacted from the attachments.) These notes reflect the functionality of combining data from various incompatible formats, including relatively "open" or "portable" formats, such as word processing and HTML applications, with data from other, relatively "closed" or "proprietary" formats, such as docketing and financial accounting systems in use at law firms at this time, and making the information available in a common format in one interface, avoiding the need for the professional to access multiple inconsistent software applications to review the data pertinent to a project.

37. For example, the "Document Links" section of Exhibit U, reflects the functionality of linking documents from other applications through icons. The "Project Management" section of Exhibit U reflects tasks that include tracking project entries

from an ODBC-compliant application, such as Microsoft Project, in addition, to drawing data maintained in a different format from the CPI database. The "Budgeting" section of Exhibit U reflects integrating tasks with budgeting, finance and billing data that is maintained in other data formats from another application (TMC at that time) in which it was maintained in a relatively "closed" or "proprietary" data format.

38. Exhibit V is a copy of my typewritten notes from a meeting with QSMI on May 31, 2001, discussing, among other issues, various alternatives for integrating financial information from the firm's accounting system into a software application of the invention. Exhibit V reflects claimed features of the present invention, namely, accessing data from different applications in different data formats, including the option of drawing data from an application in which it is maintained a relatively "closed" or "proprietary" format. Specifically, under "Section II. Budget Functionality," Exhibit V reflects drawing information from various applications in which it is maintained in various data formats, including in sub-heading "A. Options:", various ODBC-compliant formats; and in "Section B. Accounting Issues:", drawing data from a TMC database, which was at that time maintained in a relatively "closed" or "proprietary" data format. Page 3 of Exhibit V also includes a flow diagram ("6. Flowchart") and accompanying list of various applications and data formats. ("TRAQCS" refers to the name I had given internally to a professional services practice management software application embodying the invention.)

39. Exhibit W is a copy of my typewritten notes from my June 11, 2001, meeting with QSMI, during which we discussed various improvements to the software.

These notes reflect various ongoing tasks associated with updating and improving a software application embodying the invention.

40. Exhibit X is a copy of my typewritten notes of my June 25, 2001, meeting with QSMI, during which we discussed specific budgeting parameters that I had requested be included in the software application. Exhibit X also includes a "Patent Mapping," detailing the mapping of certain other fields from the CPI docketing system to a professional services project management software application embodying the invention.

41. Exhibit Y is a copy of my notes of a July 11, 2001, meeting with QSMI, detailing the status of various improvements to the software, including, in "Section IV. Accounting (TMC)" importing accounting data from a "proprietary" TMC financial accounting system (page 2) in which it was maintained in a relatively "closed" or "proprietary" data format, as well a ODBC-compliant data, such a data from a Microsoft Project application ("V. Microsoft "Project").

42. Exhibit Z is a copy of my typewritten notes from an August 7, 2001, meeting with QSMI, during which we discussed the status of various changes that I had requested to the software. Among the elements discussed, "Section II. Milestones" reflects the importation of data from the CPI docketing system and correlating this data with milestones in the TRAQCS application. "Section V. Project/Budget Strategy" reflects under "Section A. Options:", various options for integrating data in a relatively proprietary data format from a TMC time and billing system. Exhibit Z memorializes the option of using a Cold Fusion server to incorporate this data.



43. During August and September 2001, I remained in continual contact with QSMI regarding the status of these various changes to the software application. Exhibit AA is an undated copy of QSMI's "Final Status Report," detailing the status of the integration of the various aspects of the invention. Among the functionality it memorializes is: integration of the practice management software application of the invention with the firm's email system (Section I.A.); drawing data on foreign associate address and event data from the CPI application (Section II.); drawing address data from an the firm's i Enterprises Address Book, and the user's address books, in which it is maintained in different data formats at least with respect to the i Enterprises database on one hand and the user's address books on the other (Section III.); and drawing accounting data from the firm's TMC time and billing system (Section IV.)

44. U.S. Provisional Application No. 60/337,158, upon which the current application claims priority was filed on December 10, 2001.

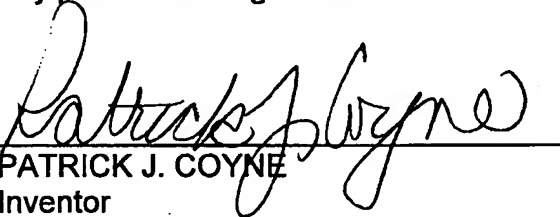
45. Following the filing of the provisional application, I continued to work with QSMI to refine the software application.

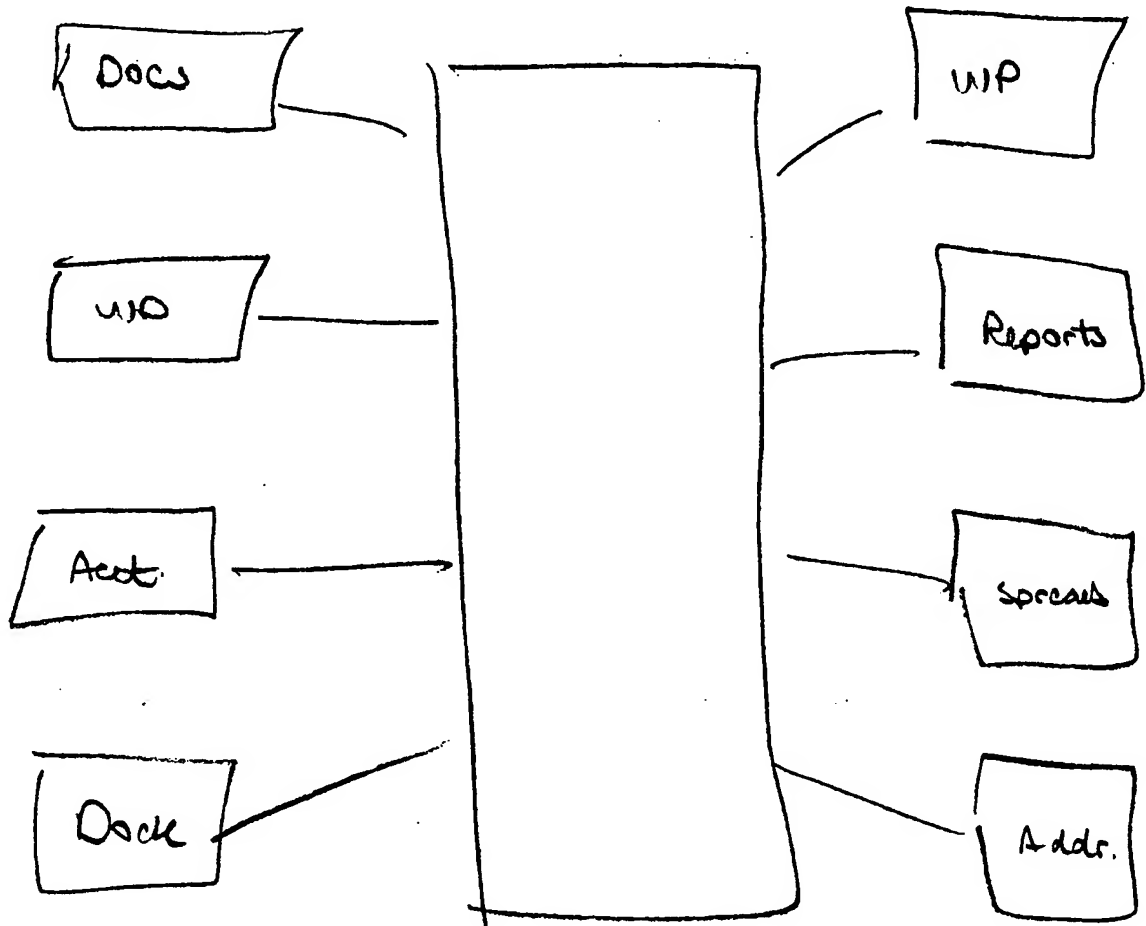
46. Based on this continual activity from the period of March or April, 1998—and no event later than July 28, 1998 for which I have provided contemporaneous documentation with this Declaration—and continuing through and after December 10, 2001, when I filed my provisional application, I exercised continual and diligent efforts to reduce to practice the invention of claims 1-3, 7-25, and 29-55 of the above-identified application.

47. I declare further that all statements made herein of my own knowledge are true and that all statements made on information and believe are believed to be true;

and further, that the statements were made with the knowledge that willful false statements and the like so made are punishable by fine or imprisonment, or both, under Section 1001 of Title of the United States Code, and that such willful false statements may jeopardize the validity of the application or any patents issuing thereon.

Date: January 21, 2009

  
PATRICK J. COYNE  
Inventor



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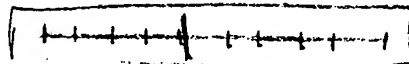
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Bibliographic

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(CPE)

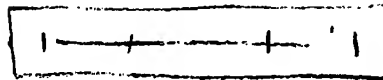
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(Notes)

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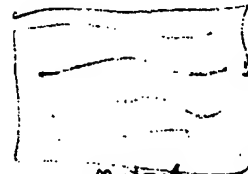
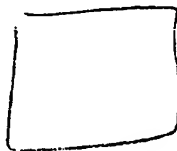
(TMC)

claim  
or

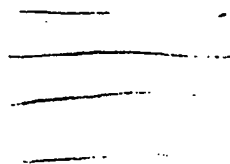
restitution

(typed or  
scanned)

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Abstract  
(scanned or  
typed)



**Edits to Database  
Meeting with QSMI  
(Nov. 3, 1998)**

- ✓ 1. Client View (Alphabetical):
  - a. Leave sorting of Clients alphabetical, change title
  - b. Add sorting features to sort matters:
    - i. By Matter Alphabetically
    - ii. By Matter Number
  - c. Collapse the Client View upon opening
- ✓ 2. Client View (By Number):
  - a. Change Title (as above)
  - b. Add sorting features to sort matters:
    - i. By Matter Alphabetically
    - ii. By Matter Number
  - c. Collapse the Client View upon opening
- 3. Add Action buttons at Database Manager
  - a. Edit Routing List
  - b. Edit Project
  - c. Edit Event
  - d. Edit Task
- 4. Add email Routing Option on every view
  - a. Client
  - b. Matter

- c. Project
- d. Event
- e. Task

✓ 5. Create Agent to Conform all names to the present convention of full name sorted by last name

✓ 6. Add periods in responsible attorney names on Keyword List

7. Responsible Attorney View

✓ a. Matter – sort alphabetically

✓ b. Project – sort alphabetically

✓ c. Event –

i. Change order of columns in the view placing Date as first column

ii. Sort by date (Date of Creation, not due date)

✓ d. Task –

i. Change order of columns in the view placing Date as first column

ii. Sort by date (Due Date not date of creation)

e. Add "Event and Task" View option under Responsible Attorney View:

i. Use format of Event/Task subviews but Change order of columns in the view placing Date as first column

ii. Sort by date

8. Closing Out:

a. Events –

i. do not require certification for retiring events

ii. Do track who, and when the event was retired

iii.

Retire events to a master archive file that has all of the data that was in the database (Call it "archive")

b.

Task:

i.

Certification system you have written appears workable

ii.

Move from Project to Task level

9.

Task View:

a.

Change order of columns in view to place Date first

b.

Sort by Date (Due Date, not date of creation)

10.

Events & Tasks View

✓ a.

Change to View Open Tasks by Client

b.

Two Subviews:

i.

By Client

(1) Columns:

(a)

Due Date

(b)

Task

(c)

Responsible Attorney

(d)

Project

(e)

Matter (Name and Number)

ii.

By Responsible Attorney

(1) Columns:

(a)

Due Date

(b)

Task

(c)

Project

(d) Matter (Name and Number)

(e) Client (Name and Number)

11.

**Calendar Views:**

a. Events --

i. Sort by Event Date

b. Tasks --

i. Sort by Due Date

c. Add "Events and Tasks" Subview

i. Both

d. Add Client Number to "Mouse Over" view

e. Add Matter name and number to right of client number in "Mouse Over" view

✓ 12. Add Database Administration to Every View

13.

**Client Report:**

a. QSMI will prepare and present proposed reporting format reporting Client, matters, Projects, and Events for a particular client

b. Operable at Client (all matters) or Matter levels simply by highlighting a client in Client View or a Matter in Matter View

i. Client Level Report:

(1) Cover Page detailing Client document

(2) Single (preferred) page for each matter detailing

(a) Projects open under that matter

(b) Events for each project

ii. Matter Level Reporting

(1) Single page having selected



- (a) Client information,
- (b) Matter information
- (c) Project
- (d) Events

**14. Management Exceptions Report**

- a. CSRS will supply list of triggering events and required follow up events
- b. QSMI will present proposal for exceptions report format based upon triggering event data supplied by PJC

**15. Ticklers**

- a. CSRS will supply ticklers generated in response to specific events
- b. QSMI will propose tickler format (tailored by Project type and (1) responsible attorney and (2) manual button)

**16. Location of Date information**

- a. Reorder Creation date (automatically generated and editable) and Due Date into first subform on window

**17. QSMI will investigate and if feasible propose work around for moving events and tasks from one project to another, if inadvertently entered under incorrect Project type**

**✓ 18. Add estimated Completion Time and Running Total by responsible attorney information to all Task Views**

**19. QSMI will propose list of required fields – validated for data entry to be accepted**

**20. Display hits on searches higher on screen, if possible**

**21. Add feature allowing Manual Routing slip to be edited (at least for responsible Attorney)**

**Client Form**

Hidden Fields:

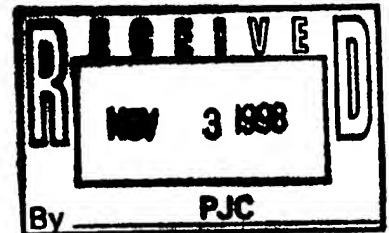
Profile flags:

COLLIER, SHANNON, RILL & SCOTT, PLLC

Please provide the following Client Information:

☒ Click here to add a new contact or change existing contact information

☒ Click here to add a new contact address or change existing contact address.



**Attorney Information**

**Document Statistics**

last modified by cvt 9/28/98

status: o.k.

# COLLIER, SHANNON, RILL & SCOTT, PLLC

## ***Default Description Profile***

### ***Event Descriptions***

**New Client Notification:**

**New Project Notification:**

**New Event Prosecution: Patent\* Notification:**

*Prosecution:*

*Trademark\**

*Prosecution: Copyright*

*Litigation\**

*Counsel and Advice*

*Other*

**New Task Prosecution: Patent\* Notification:**

*Prosecution:*

*Trademark\**

*Prosecution: Copyright*

*Litigation\**

*Counsel and Advice*

*Other*

**Responsible Attorneys:**

### ***Manual Routing***

**Litigation Routing Copy 1** *Selected on the Form*  
**Slip:**  
**Copy 2** *Selected on the Form*

**Prosecution Routing** *Copy 1 - Docket*

**Slip:**

*Copy 2*

*Copy 3*

ProsRouteCpy1

*Selected on the Form*

ProsRouteCpy3

\* These notifications are for both electronic and manual routing and are in addition to the ones which may be selected from the addressbook at the time of document composition.

**Event Form**

hidden fields: ClientDocID MatterDocID ProjectDocID EventDocID Event Sn PropClose description\_all Ref FormName

COLLIER, SHANNON, RILL & SCOTT, PLLC

0

Client Name & Number: Client\_Name Client\_No

Matter & Matter  
Number: Matter\_Name Matter\_No

Project: Project

Event Name: CopyrightEvent

PatentEvent

TrademarkEvent

CounselEvent

LitigationEvent

OtherEvent

Event Date: EventDate

Event Description: description

Responsible Attorney: resp\_atty

resp\_atty\_1

Routing Information: desc\_tm

desc\_patent

info\_other

Routing List: lit\_route\_ev

**Event Subtask Information****Event Closure****Document Statistics**

PropClose\_1

last modified by cvt 7/28/98

status: "OtherEvent" field needs list box items; "CounselEvent" field's listbox items are probably wrong.

Hidden Fields:

## Event Form Keywords

### ***Event Types***

Copyright Events:

Patent Events:

Trademark Events:

Counsel & Advice Events:

Litigation Events:

Other Events:

### ***Event Descriptions***

Prosecution: Trademark:

Prosecution: Patent:

## Project Form Keywords

### ***Project Types***

Prosecution: Copyright:

Prosecution: Trademark:

Prosecution: Patent:

Hidden Fields:

## COLLIER, SHANNON, RILL & SCOTT, PLLC

Matter Name:

Matter No:

Matter Description:

Responsible Attorney:

Billing Attorney:

Image:

(If Applicable)

### ***Invention Detail***

Client's Billing Number:

Inventor(s):

Serial Number:

Related Matter Nos:

Classes (POFA, FA):

Power of Attorney:

Conception Date:

Reduction to Practice:

Inhouse Disclosure  
Date:

External Disclosure  
Date:

[note: 1 year after an invention is disclosed out of house, if a patent app is not filed an inventor loses the right to file; therefore, if "Filing Date" is blank after, say, 50 weeks, a tickler message must be sent out]

To Whom?

## ***Document Statistics***

PropClose\_1

last modified by cvt 8/3/98

status: o.k.



Hidden Fields:

Profile Flags:

COLLIER, SHANNON, RILL & SCOTT, PLLC

## ***Project -***

Client Name & Number:

Matter Name & Number:

Project:

Description:

Country:

Associate:

Associate Address:

Responsible Attorney:

## ***Project Detail***

<Computed Subform>

## ***Document Statistics***

last modified by cvt 9/28/98

status: o.k.

hidden Fields

## COLLIER, SHANNON, RILL & SCOTT, PLLC

### **Default Routing Profile**

#### **Electronic Routing**

New Client  
Notification:

New Project  
Notification:

New Event Prosecution: Patent\*  
Notification:

Prosecution:

Trademark\*

Prosecution: Copyright

Litigation\*

Counsel and Advice

Other

New Task Prosecution: Patent\*  
Notification:

Prosecution:

Trademark\*

Prosecution: Copyright

Litigation\*

Counsel and Advice

Other

Responsible  
Attorneys:

#### **Manual Routing**

Litigation Routing Copy 1  
Slip: Selected on the Form

Copy 2 Selected on the Form

**Prosecution Routing** *Copy 1 - Docket*  
**Slip:**

ProsRouteCpy1

*Copy 2*

*Selected on the Form*

*Copy 3*

ProsRouteCpy3

\* These notifications are for both electronic and manual routing and are in addition to the ones which may be selected from the addressbook at the time of document composition.

hidden fields: ClientDocID MatterDocID ProjectDocID EventDocID PropClose

COLLIER, SHANNON, RILL & SCOTT, PLLC

0

Client Name & Number: Client\_Name Client\_No

Matter & Matter  
Number: Matter\_Name Matter\_No

Project: Project

Task Name: Task

Due Date: TaskDate

Description: PDescrip

Responsible Attorney: resp\_atty

resp\_atty\_1

## ***Subtask Information***

## ***Task Closure***

## ***Document Statistics***

PropClose\_1

last modified by cvt 8/3/98

status: needs some work

## Email Notification

**Recipients:**

SendTo

**Subject:**

Subject\_d

HoldTxt\_d

**Comments:**

EditTxt

Subject

Body

Client's Billing Number	clients_billing (edit control)
Inventor's Name	inventor (edit control)
Serial Number	serial_number (edit control)
Related Matter No.	related_matter_no (edit control)
POFA F/A	pofa_fa (edit control)
Power of Attorney	PoA (combobox)
Conception	concept (edit control)
Reduction to Practice	rp (edit control)
Inhouse Disclosure Date	inhouse_disclos (edit control)
External Disclosure Date	external_disclos (edit control)
To Whom?	whom (edit control)

**last modified by:** cvt 9/20/98

**status:** o.k.

hidden fields:

**NOTE:** This is the Project Profile Form. It is used in the ProjectTypes view to compute the @ENVIRONMENT(SubType) variable when creating a New Task from the Matter Form or the Client View.

**Project Type:**

hidden fields:



**COLLIER, SHANNON, RILL & SCOTT, PLLC**

**client**

**cli\_mat**

**Litigation Routing Slip**

Re: **lit\_rout\_re**

Document: **document**

Routed By: **route\_author** On: **cre\_date**

**Routing Information**

Copy 1: **route\_to**

Copy 2: **lit\_route\_to**

last modified by: cvt 9/23/98

status: need feedback on what info is to go into the "lit\_rout\_re" and "document" fields.



hidden fields:

REF1



**COLLIER, SHANNON, RILL & SCOTT, PLLC**

**client**

**route\_type**

Client Number: **no\_1**

Reference: **ref**

Date Processed: **cre\_date** By: **route\_author**

### Routing Information

**Copy 1: Docket/Byron Derringer**

**Copy 2: Responsible Attorney: **route\_to****

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Copy 3: Routed To:**

**Patrick Coyne** \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Shelly Silver** \_\_\_\_\_

Filing Date:	filling_date (edit control)
Termination Date:	term_date (edit control)
Reason:	why_term (combobox)
Maintenance:	maint (edit control)

Parent Status:

last modified by cvt 8/3/98

status:

Date of First Use	first_use (edit control)
First Use	i_state_use (edit control)
Filing Date	filing_date (edit control)
Termination	termination (combobox)
Term Date	term_date (edit control)
How?	how_term (combobox)
Renewal	renewal (edit control)

**Trademark Status**

last modified by cvt 9/21/98

status: o.k.

## APPENDIX

**Client Form**

Hidden Fields: SendTo DocType ClientDocID PropClose LNameResult

Profile flags: Title FirstName MiddleInitial LastName Suffix PhoneNumber Fax StreetAddress City

State ZIP Country Email DocID Contract\_Address\_1 Contact\_Name\_1

**COLLIER SHANNON SCOTT, PLLC**

Client Form

Please provide the following Client Information:

Client Name:	Client_Name
Client Number:	Client_No
Contact Name:	Contact_Name
Contact Address:	Contact_Address Find Address
Line of Business:	LOB
Products / Services:	Prod_Line

**Attorney Information**

Referral:	Referred_By
Originating Attorney:	Orig_Atty
Billing Attorney:	Bill_Atty
Billing:	FeeBasis
Alternative:	NonStandardFee
Related To:	RelateClient

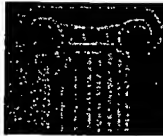
**Document Statistics**

last modified by cvt 9/28/98  
 status: o.k.

### Client Form

Hidden Fields: SendTo DocType ClientDocID PropClose

Profile flags: Title FirstName MiddleInitial LastName Suffix PhoneNumber Fax StreetAddress City  
State ZIP Country Email DocID



**COLLIER SHANNON SCOTT, PLLC**

Client Form

Please provide the following Client Information:

Client Name:	Client_Name
Client Number:	Client_No
Contact Name:	Contact_Name Contact_Name_1 <input checked="" type="checkbox"/> Click here to add a new contact or change existing contact information
Contact Address:	Contact_Address Contact_Address_1 <input checked="" type="checkbox"/> Click here to add a new contact address or change existing contact address.
Line of Business:	LOB
Products / Services:	Prod_Line

### Attorney Information

Referral:	Referred_By
Originating Attorney:	Orig_Atty
Billing Attorney:	Bill_Atty
Billing:	FeeBasis
Alternative:	NonStandardFee
Related To:	RelateClient

### Document Statistics

last modified by cvt 9/28/98  
status: o.k.

✓	Client's Billing Number	clients_billing (edit control)
	Inventor(s)	inventor (edit control)
	Serial Number	serial_number (edit control)
	Related Matter Nos.	related_matter_no (edit control)
	Classes (POFA, F/A)	pofa_fa (edit control)
	Power of Attorney	POA (combobox)
	Conception	concept (edit control)
	Reduction to Practice	rp (edit control)
	Inhouse Disclosure Date	inhouse_disclos (edit control)
	External Disclosure Date	external_disclos (edit control)
	To Whom?	whom (edit control)

last modified by: cvt 9/20/98

status: o.k.

Phone Labels	Phone Numbers
PhoneLabel_1 (edit)	OfficePhoneNumber
PhoneLabel_3 (edit)	OfficeFAXPhoneNumbe
PhoneLabel_5 (edit)	CellPhoneNumber
PhoneLabel_2 (edit)	PhoneNumber (edit)
PhoneLabel_4 (edit)	omeFAXPhoneNumbe
PhoneLabel_6 (edit)	PhoneNumber_6 (edit)

Hidden Fields: ClientDocID MatterDocID PropClose OldMatterNo



Matter Form

--

Client\_Name [ Client\_No ]

Matter Name: Matter\_Name


Matter No: Matter\_No

Matter Creation Date: cre\_date

Related Matter Numbers: description

Responsible Attorney: resp\_atty

Billing Attorney: Bill\_Atty

 Image

## Document Statistics

last modified by cvt 8/3/98  
status: o.k.



Hidden Fields: ClientDocID MatterDocID ProjectDocID RespAtty\_init StreetAddress City State ZIP

Country ProjectNumFC

Profile Flags: SubType PropClose ProjMatter



Project Form

## Project -

Client Name & Number: Client\_Name [ Client\_No ]

Matter Name & Number: Matter\_Name [ Matter\_No ]

Project: Project

Project Creation Date: cre\_date

Description: PDescrip

Country: ProjectCountry

Create Separate Country Projects: SepProj

Foreign Associate: Associate

Associate Address: Assoc\_Address ~~Assoc\_Address~~

Responsible Attorney: resp\_atty

Comments: PComments

Image: ~~Attach Image~~ Image

## Project Detail

<Computed Subform>

## Document Statistics

PDescrpt clients\_billing Client\_Name Client\_No Project RespAtty\_init ProjectCountry



**COLLIER SHANNON SCOTT, PLLC**

Please enter all dates in the format MM/DD/YY.

Next Action: Pr\_Next\_Action

Action by: Pr\_NextActionby

Date Action Due: Pr\_Action\_Date

Date Complete: Pr\_DateComplete

Priority: Pr\_Priority

Status: Pr\_Status

Estimated Hours: Pr\_Hours

Summary of action taken: Pr\_Summary

~~Close and Archive Action~~

### **Project Action Archive**

Completed Actions: Pr\_Archive

hidden fields: DocType

NOTE: This is the Project Profile Form. It is used in the ProjectTypes view to compute the @ENVIRONMENT(SubType) variable when creating a New Project from the Matter Form or the Client View.

Project Type: ProjectType

Appended  
12:02  
6-23-2003  
pc

### Event Form

hidden fields: ClientDocID MatterDocID ProjectDocID EventDocID Event Sn PropClose description\_all Ref FormName



Event Form

0

Client Name & Number: Client\_Name [ Client\_No ]

Matter & Matter Number: Matter\_Name [ Matter\_No ]

Project: Project

Date Event Created: cre\_date  
cre\_date\_d

Event Date (mm/dd/yy): EventDate

Anticipated Date to  
Achieve Next Milestone: mistn\_date

Milestone/Event Name: CopyrightEvent  
PatentEvent  
TrademarkEvent  
CounselEvent  
LitigationEvent  
OtherEvent  
TransactionalEvent

Description: PDescrip

Responsible Attorney: resp\_atty  
resp\_atty\_1

Routing Information: lit\_route\_ev

## Event Retirement

To retire this event, press the button: RetireEvent

Protect this form from Archive: ProtectFromArchive

Event Retired (date): TEDateComplete

Retired by: Retire\_By

UnHideEV ClosingEV

## **Document Statistics**

Document Status:

Document History:

---

last modified by cvt 7/28/98

status: "OtherEvent" field needs list box items; "CounselEvent" field's listbox items are probably wrong.

Hidden Fields: Hide FirstLast



## Event Form Keywords

### **Event Types**

Copyright Events:	ET1
Patent Events:	ET2
Trademark Events:	ET3
Counsel & Advice Events:	ET4
Litigation Events:	ET5
Other Events:	ET6

### **Event Descriptions**

Prosecution: Trademark:	ED1
Prosecution: Patent:	ED2



## Project Form Keywords

### **Project Types**

Prosecution: Copyright:	PT1
Prosecution: Trademark:	PT2
Prosecution: Patent:	PT3
Project Countries:	PC1
Project Application Types:	AT1

**Client Form**

Hidden Fields: SendTo DocType ClientDocID LNameResult

Profile flags: FirstName MiddleInitial LastName Suffix PhoneNumber Fax Country Email  
DocID Contract\_Address\_1 Contact\_Name\_1 PropClose

[&lt;br&gt;]

Collier Shannon Scott

[&lt;br&gt;]

**Client Form**

Please provide the following Client Information:

Client Name: Client\_Name

Client Number: Client\_No

Contact Name: Contact\_Name

Contact Address: Contact\_Address

Line of Business: LOB

Products / Services: Prod\_Line

**Attorney Information**

Referral: Referred\_By

Originating  
Attorney: Orig\_Atty

Billing Attorney: Bill\_Atty

Billing: FeeBasis

Alternative: NonStandardFee

Related To: RelateClient

**Document Statistics**

last modified by cvt 9/28/98

status: o.k.

### Event Form

hidden fields: ClientDocID MatterDocID ProjectDocID EventDocID Event Sn PropClose description\_all Ref

[<br>]

Collier Shannon Scott

[<br>]

### Event Form

0

Client Name & Number: Client\_Name [ Client\_No ]

Matter & Matter Number: Matter\_Name [ Matter\_No ]

Project: Project

Date Event Created: cre\_date  
cre\_date\_d

Event Date (mm/dd/yy): EventDate

Anticipated Date to Achieve Next Milestone: mlsn\_date

Milestone/Event Name: CopyrightEvent  
PatentEvent  
TrademarkEvent  
CounselEvent  
LitigationEvent  
OtherEvent  
TransactionalEvent

Description: PDescrip

Responsible Attorney: resp\_atty  
resp\_atty\_1

Routing Information: lit\_route\_ev

### Event Retirement

To retire this event, press the **Retire Event** button:

Protect this form from Archive: ProtectFromArchive

Event Retired (date): TEDateComplete

Retired by: Retire\_By

UnHideEV ClosingEV



## ***Document Statistics***

**Document Status:**

**Document History:**

last modified by cvt 7/28/98

status: "OtherEvent" field needs list box items; "CounselEvent" field's listbox items are probably wrong.

Hidden Fields: ClientDocID MatterDocID PropClose OldMatterNo

[<br>]

Collier Shannon Scott

[<br>]

**Matter Form**

Client Name [ Client No ]

Matter Name: Matter\_Name

Description: description

Matter No: Matter\_No

Matter Creation Date: cre\_date

Related Matters: related\_to

Responsible Attorney: resp\_atty

Billing Attorney: Bill\_Atty

Image: Image

***Invention Detail***

***Document Statistics***

last modified by cvt 8/3/98

status: o.k.

Hidden Fields: ClientDocID MatterDocID ProjectDocID RespAtty\_init ProjectNumFC BudgetType

Profile Flags: SubType PropClose ProjMatter

[<br>]

Collier Shannon Scott

[<br>]

Project Form

**Project -**

Client Name & Number: Client\_Name Client\_No

Matter Name & Number: Matter\_Name Matter\_No

Project: Project

Project Creation Date: cre\_date

Description: PDescrip

Country: ProjectCountry

Create Separate Country Projects: SepProj

Foreign Associate: Associate

Associate Address: Assoc\_Address

Responsible Attorney: resp\_atty

Comments: PComments

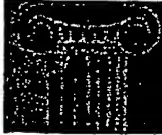
Image: Image

**Project Detail**

<Computed Subform>

**Document Statistics**

hidden Fields Pcontrol\_ODBCPassword Tcontrol\_ODBCPassword



**COLLIER SHANNON SCOTT, PLLC**

### **Data Transfer Configuration**

Select which Database to configure: Database |

### **Patent Mapping**

#### **Field Mapping**

Notes Field	Field Type	ODBC Column	Column Type
PNotesField	PNotesFieldType	PODBCColumn	PODBCColumnType

\*Note: Sometimes the values used as the key are different in the Notes db than in the DSN. If so, the "Notes Map" field tells the application to use this DSN column when looking for the Notes record. The "ODBC Map" field tells the application that this is the DSN Table key column. The "Notes Key Field Name" should contain the same value as the Notes Map ODBC Key Column, although the field names may be different.

### **Trademark Mapping**

#### **Field Mapping**

Notes Field	Field Type	ODBC Column Type	Column Type
TNotesField	TNotesFieldType	TODBCColumn	TODBCColumnType

\*Note: Sometimes the values used as the key are different in the Notes db than in the DSN. If so, the "Notes Map" field tells the application to use this DSN column when looking for the Notes record. The "ODBC Map" field tells the application that this is the DSN Table key column. The "Notes Key Field Name" should contain the same value as the Notes Map ODBC Key Column, although the field names may be different.







## Email Notification

Recipients:

SendTo

Subject:

Subject\_d

Comments:

EditTxt

Subject

Body

CopyTo

Hidden Fields: ClientDocID MatterDocID PropClose OldMatterNo



Matter Form

Client\_Name [ Client\_No ]

Matter Name: Matter\_Name

Description: description

Matter No: Matter\_No

Matter Creation Date: cre\_date

Related Matters: related\_to

Responsible Attorney: resp\_atty

Billing Attorney: Bill\_Atty

Image: Image

Attach Image

Remove Image

**Invention Detail**

**Document Statistics**

last modified by cvt 8/3/98

status: o.k.



## Event Form

hidden fields: ClientDocID MatterDocID ProjectDocID EventDocID Event Sn PropClose description\_all Ref FormName



Event Form

0

Client Name & Number: Client\_Name Client\_No

Matter & Matter Number: Matter\_Name Matter\_No

Project: Project

Date Event Created: cre\_date  
cre\_date\_d

Event Date (mm/dd/yy): EventDate

Anticipated Date to Achieve Next Milestone: mlsn\_date

Current Milestone this Project is at: curr\_Milestone

Is this Event the next Milestone Event?: milestoneToggle

Click HERE to select next milestone event.

curr\_Milestone\_Num HIDDEN

How chat

Event Name: CopyrightEvent

PatentEvent

TrademarkEvent

CounselEvent

LitigationEvent

OtherEvent

Subject: PDescrip

Responsible Attorney: resp\_atty

resp\_atty\_1

Routing Information: lit\_route\_ev

## Event Retirement

To retire this event, press the button: RetireEvent

Protect this form from Archive: ProtectFromArchive

Event Retired (date): TEDateComplete

Retired by: Retire\_By

UnHideEV ClosingEV

## Document Statistics

Document Status: Status\_1

Document History: History

last modified by cvt 7/28/98

status: "OtherEvent" field needs list box items; "CounselEvent" field's listbox items are probably wrong.

hidden fields: ClientDocID MatterDocID ProjectDocID EventDocID PropClose FormName clients\_billing inventor PComme



Task Form

Client Name & Number: Client\_Name Client\_No ]

Matter & Matter Number: Matter\_Name Matter\_No ]

Project: Project

Comments: Task

Task Creation Date: cre\_date

cre\_date\_d

Projected Due Date: TaskDate

Estimated Time to Complete: Pr\_Hours

Task Priority: Pr\_Priority

Task Status: Pr\_Status

Assigned To: resp\_atty

resp\_atty\_1

Routing List: lit\_route\_ev

Reminder Date: rd\_disp

## Task Closure

Press button to initiate task closure:



## Certificate of Completion

Responsible Attorney Certificate:

IP Docket Manager Certificate:

hidden fields: TEArchive RAClosed UnHideRA UnHideDM

## Document Statistics

Document Status: Status\_1

Document History: History

last modified by cvt 8/3/98  
status: needs some work

\$MessageType



Archive Entries: LogCount of LogTotal for ArchiveDate

---

Body

---

ArchiveTrailer

Hidden: Subject Categories

Hello



## Archive Profile

ArchiveExpired

after ExpiredLife days

ArchiveLog

IncludeDoclinks

Archive Profile Editors:

ProfileEditors

Archive Server Name:

ArchiveServer

Archive Database Path: \*

ArchivePath

\*Enter the full path to the Archive database relative to the Notes data directory, ie: apps\ArchiveDB

## Change Responsible Attorney

Choose Responsible Attorney to Replace:

Choose New Responsible Attorney:

h  
i  
d  
d  
e  
n  
f  
i  
e  
l  
d  
s  
:

FormName

**Collier, Shannon, Rill & Scott, PLLC**

RptName

**Created For:** client

**As of:** ReportDate

# RptType

Matter Name	Matter Number	Creation Date	Description
BodyName	BMat	BDate	BodyDes
BodyName_1	BMat_1	BDate_1	BodyDes_1
BodyName_2	BMat_2	BDate_2	BodyDes_2
BodyName_3	BMat_3	BDate_3	BodyDes_3
BodyName_4	BMat_4	BDate_4	BodyDes_4
BodyName_5	BMat_5	BDate_5	BodyDes_5
BodyName_6	BMat_6	BDate_6	BodyDes_6
BodyName_7	BMat_7	BDate_7	BodyDes_7
BodyName_8	BMat_8	BDate_8	BodyDes_8
BodyName_9	BMat_9	BDate_9	BodyDes_9
BodyName_10	BMat_10	BDate_10	BodyDes_10
BodyName_11	BMat_11	BDate_11	BodyDes_11
BodyName_12	BMat_12	BDate_12	BodyDes_12
BodyName_13	BMat_13	BDate_13	BodyDes_13
BodyName_14	BMat_14	BDate_14	BodyDes_14
BodyName_15	BMat_15	BDate_15	BodyDes_15
BodyName_16	BMat_16	BDate_16	BodyDes_16
BodyName_17	BMat_17	BDate_17	BodyDes_17
NextPage			



Client Matter Report for Client2 - Continued

Matter Name	Matter Number	Creation Date	Description
BodyName_18	BMat_18	BDate_18	BodyDes_18
BodyName_19	BMat_19	BDate_19	BodyDes_19
BodyName_20	BMat_20	BDate_20	BodyDes_20
BodyName_21	BMat_21	BDate_21	BodyDes_21
BodyName_22	BMat_22	BDate_22	BodyDes_22
BodyName_23	BMat_23	BDate_23	BodyDes_23
BodyName_24	BMat_24	BDate_24	BodyDes_24
BodyName_25	BMat_25	BDate_25	BodyDes_25
BodyName_26	BMat_26	BDate_26	BodyDes_26
BodyName_27	BMat_27	BDate_27	BodyDes_27
BodyName_28	BMat_28	BDate_28	BodyDes_28
BodyName_29	BMat_29	BDate_29	BodyDes_29
BodyName_30	BMat_30	BDate_30	BodyDes_30
BodyName_31	BMat_31	BDate_31	BodyDes_31
BodyName_32	BMat_32	BDate_32	BodyDes_32
BodyName_33	BMat_33	BDate_33	BodyDes_33
BodyName_34	BMat_34	BDate_34	BodyDes_34
BodyName_35	BMat_35	BDate_35	BodyDes_35

hidden fields

FormName

Collier, Shanni

F

Created For: client

As of: ReportDate

Matter Name	
BodyName	
BodyName_1	
BodyName_2	
BodyName_3	
BodyName_4	
BodyName_5	
BodyName_6	
BodyName_7	
BodyName_8	
BodyName_9	
BodyName_10	
BodyName_11	
BodyName_12	
BodyName_13	
BodyName_14	
BodyName_15	
BodyName_16	
BodyName_17	
NextPage	

Client Matter Report for Client2 - Continued

Matter Name	Matter Number	Creation Date	Description
BodyName_18	BodyMatter_18	BodyDate_18	BodyDes_18

BodyName_19	BodyMatter_19	BodyDate_19	BodyDes_19
BodyName_20	BodyMatter_20	BodyDate_20	BodyDes_20
BodyName_21	BodyMatter_21	BodyDate_21	BodyDes_21
BodyName_22	BodyMatter_22	BodyDate_22	BodyDes_22
BodyName_23	BodyMatter_23	BodyDate_23	BodyDes_23
BodyName_24	BodyMatter_24	BodyDate_24	BodyDes_24
BodyName_25	BodyMatter_25	BodyDate_25	BodyDes_25
BodyName_26	BodyMatter_26	BodyDate_26	BodyDes_26
BodyName_27	BodyMatter_27	BodyDate_27	BodyDes_27
BodyName_28	BodyMatter_28	BodyDate_28	BodyDes_28
BodyName_29	BodyMatter_29	BodyDate_29	BodyDes_29
BodyName_30	BodyMatter_30	BodyDate_30	BodyDes_30
BodyName_31	BodyMatter_31	BodyDate_31	BodyDes_31
BodyName_32	BodyMatter_32	BodyDate_32	BodyDes_32
BodyName_33	BodyMatter_33	BodyDate_33	BodyDes_33
BodyName_34	BodyMatter_34	BodyDate_34	BodyDes_34
BodyName_35	BodyMatter_35	BodyDate_35	BodyDes_35

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FormName

Collier, Shanni

F

Created For: client

As of: ReportDate

RptType For Matt

Project Name	Creation Date	
Body_1	Body_2	Body_3

Select the Responsible Attorney to Remove

Attorney (combobox)

AttyTmp (static text)

## Replace Clients or Matters

Choose a new Client to associate Matter with \*


new\_client

Choose a new Matter to associate Project with \*

new\_matter

\*Note: If you selected a client originally, all that Client's  
Matters will be associated with the new Client



 **COLLIER SHANNON SCOTT PLLC**  
- Client Matter Report -

Select a Client:

Enter a Report Date:



☒

**COLLIER, SHANNON, RILL & SCOTT, PLLC**  
- Client Project Report -

Select a Matter

.....matter (edit control).....

Enter a Report Date

.....ReportDate (edit control).....

hidden: DocUID



<input checked="" type="checkbox"/>		<b>COLLIER, SHANNON, RILL &amp; SCOTT, PLLC</b>	
		<i>- Client Matter Report -</i>	
Select Responsible Attorney:	resp_atty (combobox)		
Enter a Report Date:	ReportDate (edit control)		

Hidden Fields: client



**COLLIER SHANNON SCOTT, PLLC**

## Default Routing Profile

### Electronic Routing

New Client Notification:

NewClient\_Routing

New Matter Notification:

NewMatter\_Routing

New Project Notification:

NewProj\_Routing

New Event Notification: Prosecution: Patent\*

Patent\_Routing

Prosecution: Trademark\*

TM\_Routing

Prosecution: Copyright

Cpy\_Routing

Litigation\*

DLit\_Routing

Counsel and Advice

CA\_Routing

Other

Oth\_Routing

New Task Notification: Prosecution: Patent\*

Patent\_Routing\_1

Prosecution: Trademark\*

TM\_Routing\_1

Prosecution: Copyright

Cpy\_Routing\_1

Litigation\*

DLit\_Routing\_1

Counsel and Advice

CA\_Routing\_1

Other

Oth\_Routing\_1

Docket Manager:

DocketMgr

Responsible Attorneys:

Add Attorney Edit Work Partner

Remove Attorney

Responsible Attorney - Work Partner

ProAtty AttyPartners

### Manual Routing

Litigation Routing: Copy 1

Selected on the Form

hidden fields:

REF1



**COLLIER, SHANNON, RILL & SCOTT, PLLC**

route\_type

ClientNameNum

MatterNameNum

Reference:

pros\_rout\_re

Date Processed:

Cre\_date1 By: route\_author1

### Routing Information

☐ Copy 1: Docket: PRoute\_1

☐ Copy 2: Responsible Attorney: PRoute\_2

☐ Copy 3: Routed To:

PRoute\_3

☐ Copy 4: PRoute\_4

last modified by mjh 3/18/99

hidden fields:

REF1



**COLLIER, SHANNON, RILL & SCOTT, PLLC**

route\_type

ClientNameNum

MatterNameNum

Reference:

pros\_rout\_re

Date Processed:

Cre\_date1

By:

route\_author1

### Routing Information

Copy 1:

Docket:

PRoute\_1

Copy 2:

Responsible Attorney:

PRoute\_2

Copy 3:

Routed To:

PRoute\_3

Copy 4:

PRoute\_4

last modified by mjh 3/18/99

hidden fields:

REF1



**COLLIER, SHANNON, RILL & SCOTT, PLLC**

route\_type

ClientNameNum

MatterNameNum

Reference:

pros\_rout\_re

Date Processed:

Cre\_date1 By: route\_author1

### Routing Information

Copy 1:

Docket: PRoute\_1

Copy 2:

Responsible Attorney: PRoute\_2

Copy 3:

Routed To:

PRoute\_3

Copy 4:

PRoute\_4

last modified by mjh 3/18/99



hidden fields:

REF1



**COLLIER, SHANNON, RILL & SCOTT, PLLC**

route\_type

ClientNameNum

MatterNameNum

Reference:

pros\_rout\_re

Date Processed:

Cre\_date1 By: route\_author1

### Routing Information

☐ Copy 1:

Docket: PRoute\_1

☐ Copy 2:

Responsible Attorney: PRoute\_2

☐ Copy 3:

Routed To:

PRoute\_3

☐ Copy 4:


PRoute\_4

☐ Copy 5:

PRoute\_5

last modified by mjh 3/18/99

hidden fields: Tempfid

 <b>COLLIER SHANNON SCOTT, PLLC</b> COLLIER SHANNON SCOTT, PLLC		<b>route_type</b>
<b>ClientNameNum</b>		
<b>MatterNameNum</b>		
Reference: <b>lit_rout_re</b>		
Document: <b>document</b>		
Routed By: <b>route_author1</b> On: <b>cre_date1</b>		
<b>Routing Information</b>		
1:	<input type="checkbox"/> Copy	Responsible Attorney: <b>lit_route1_to</b>
	<input type="checkbox"/> Copy 2:	<b>lit_route_to</b>

last modified by: cvt 9/23/98

status: need feedback on what info is to go into the "lit\_rout\_re" and "document" fields.

hidden fields:

REF1



COLLIER SHANNON SCOTT, PLLC  
COLLIER SHANNON SCOTT, PLLC

route\_type

ClientNameNum

MatterNameNum

Reference:

pros\_rout\_re

Date Processed:

Cre\_date1 By: route\_author1

### Routing Information

Copy 1:

Docket: PRoute\_1

RESPONSIBLE ATTORNEY: (Check Docket Entry)

Docket Entry OK\_\_\_ Edit Docket Entry\_\_\_

Patrick J. Coyne\_\_\_\_\_

Copy 2:

Responsible Attorney: PRoute\_2

last modified by mjh 3/18/99

hidden fields:

REF1



COLLIER SHANNON SCOTT, PLLC  
COLLIER SHANNON SCOTT, PLLC

route\_type

ClientNameNum

MatterNameNum

PRoute\_2

Reference:

pros\_rout\_re

Date Processed:

Cre\_date1

By:

route\_author1

### Routing Information

Copy 1:

Docket:

PRoute\_1

JASON FLEISHER

Scanned \_\_\_\_ Email \_\_\_\_ Original Forwarded \_\_\_\_

AMY WALDRON: (Check Docket Entry)

Docket Entry OK \_\_\_\_ Edit Docket Entry \_\_\_\_

Patrick J. Coyne \_\_\_\_\_

last modified by mjh 3/18/99

hidden fields:

REF1



COLLIER SHANNON SCOTT, PLLC  
COLLIER SHANNON SCOTT, PLLC

route\_type

ClientNameNum

MatterNameNum

PRoute\_2

Reference:

pros\_rout\_re

Date Processed:

Cre\_date1 By: route\_author1

### Routing Information

Copy 1:

Docket:

PRoute\_1

JASON FLEISHER

Scanned \_\_\_\_ Email \_\_\_\_ Original Forwarded \_\_\_\_

AMY WALDRON: (Check Docket Entry)

Docket Entry OK \_\_\_\_ Edit Docket Entry \_\_\_\_

Patrick J. Coyne \_\_\_\_\_

last modified by mjh 3/18/99

Select the Responsible Attorney and Work Partner


Attorney (combobox)

Select Work Partner

Step 1 (checkbox)




Filing Date:	filing_date (edit control)
Termination Date:	term_data (edit control)
Reason:	why_term (combobox)
Maintenance:	maint (edit control)

 **Patent Status**

last modified by cvt 8/3/98

status:

Date of First Use:	first_use (edit control)
First Use:	i_state_use (edit control)
Filing Date:	filing_date (edit control)
Termination:	termination (combobox)
Date:	term_date (edit control)
How?	how_term (combobox)
Renewal:	renewal (edit control)

 Trademark Status

last modified by cvt 9/21/98  
status: o.k.

Select the Responsible Attorney and Work Partner

Select Attorney

Attorney (static text)

Select Work Partner

Secretary (static text)

hidden Fields : Pcontrol\_ODBCPassword Tcontrol\_ODBCPassword



**COLLIER SHANNON SCOTT, PLLC**

### **Data Transfer Configuration**

Select which Database to configure: Database

### **Patent Information**

#### **ODBC Data Source**

Data Source Name:

Pcontrol\_ODBCDSN

Data Source ID:

Pcontrol\_ODBCID

Data Source Table Name:

Pcontrol\_ODBCTableName

ODBC Key Column: (Notes Map  
)\*

Pcontrol\_ODBCKeyColumn

ODBC Key Column: (ODBC  
Map)\*

Pcontrol\_ODBCKeyColumnDSN

\*Note: Sometimes the values used as the key are different in the Notes db than in the DSN. If so, the "Notes Map" field tells the application to use this DSN column when looking for the Notes record. The "ODBC Map" field tells the application that this is the DSN Table key column. The "Notes Key Field Name" should contain the same value as the Notes Map ODBC Key Column, although the field names may be different.

### **Trademark Information**

#### **ODBC Data Source**

Data Source Name:

Tcontrol\_ODBCDSN

Data Source ID:

Tcontrol\_ODBCID

Data Source Table Name:

Tcontrol\_ODBCTableName

ODBC Key Column: (Notes Map  
)\*

Tcontrol\_ODBCKeyColumn

ODBC Key Column: (ODBC  
Map)\*

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